

**LSF002 – LaGov Purchasing, Contracts, & Inventory  
REQUEST FOR SECURITY – FORM INSTRUCTIONS**

Revised 07/14

This form is currently designed for use by agencies to establish, revise, and remove security related to a position.

**Position Number:** Position number to be assigned LaGov purchasing, contracts, and inventory security.

**Position Business Area:** Position belongs to this business area.

**Name:** Employee name.

**Personnel Number:** Personnel number assigned by HR department.

**Inventory Plant Access:** List of plant numbers in which the user requires access.

**Action:** **Check appropriate action to be taken for position number listed on this form.**

**Add:** Add the selected security to the position. Any existing security on the position governed by this form will remain intact.

**Remove:** Removes all security governed by the form from the position. Do not select any job functions when choosing the **Remove** action.

**Change:** Change any existing security on the position governed by this form to match only the selected security on this form.

**Temp Auth:** Add temporary authorization for the selected security to this position. Use the start date and end date to establish the validity period for the temporary authorization.

**Start Date:** The beginning date for the permissions requested.

**End Date:** The ending date for the permissions requested. If not a temporary authorization request, then the end date should always be 12/31/9999.

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**Inventory Job Functions:**

MM-02 Goods/Services Receiver	Responsible for the receipt of goods and services associated with a purchase order and changing or canceling material documents associated with the good receipt. Items to be received can be from an external vendor or from another inventory site. Also incorporates: FI-01 Financial Inquiry Only LO-01 Logistics Inquiry Only
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MM05 Inventory Processor	Responsible for: Creating, changing, or canceling goods movement transactions; Creating and updating outbound delivery documents; Transferring inventory materials; Creating IM inventory count documents; Changing IM inventory counts; Creating an IM inventory recount; Blocking, unblocking, changing, analyzing or posting a change notice for a material; Monitoring delivery due dates; Managing of batch inventories. Also incorporates: FI-01 Financial Inquiry Only LO-01 Logistics Inquiry Only
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MM-03 Inventory Manager	<p>Same responsibilities as the inventory clerk/operator; And responsible for: Maintaining and updating plant master data; Replenishment of inventory materials through planned orders (requisitions/orders); Unblocking materials; Transferring inventory materials; Creating inventory counts and recounts; Verifies and clears differences from the inventory count.</p> <p>Also incorporates: FI-01 Financial Inquiry Only LO-01 Logistics Inquiry Only</p>
MM-04 Inventory Requestor	<p>Responsible for requesting an item from inventory that will be expensed at the time of issue.</p> <p>Also incorporates: FI-01 Financial Inquiry Only LO-01 Logistics Inquiry Only</p>
MM-06 Requisition Approver Group 1	<p>Responsible for approving stock replenishment requisitions for inventory items.</p> <p>Also incorporates: LO-01 Logistics Inquiry Only</p>
MM-07 Requisition Approver Group 2	<p>Responsible for approving PM and Fleet requisitions for external procurement.</p> <p>Also incorporates: LO-01 Logistics Inquiry Only</p>
MM-08 Requisition Approver Group 3	<p>Responsible for approving expense requisitions of inventory items.</p> <p>Also incorporates: LO-01 Logistics Inquiry Only</p>
WM-01 Warehouse Clerk/Operator	<p>Responsible for: Picking, issuing, and returning inventory materials; Receiving items; Bin to bin movements of materials; Conducting physical inventory counts via the handheld device or execution of the transaction code(s) on the desk top.</p> <p>Also incorporates: LO-01 Logistics Inquiry Only</p>
WM-03 Warehouse Supervisor	<p>Responsible for: Creating, changing, or canceling a transfer order (instructions to move an inventory material); Creating and updating outbound delivery documents; Transferring inventory materials; Creating WM inventory count documents; Changing WM inventory counts; Creating a WM inventory recount; Management of bin replenishment; Blocking, unblocking, analyzing or posting a change notice for a material; Monitoring delivery due dates; Monitoring warehouse managed outbound and inbound deliveries; Scrapping materials. <b>NOTE:</b> The warehouse supervisor role should include the inventory clerk/operator role to perform the inventory transactions in conjunction with warehouse transactions.</p> <p>Also incorporates: MM05 Inventory Processor FI-01 Financial Inquiry Only LO-01 Logistics Inquiry Only</p>
WM-02 Warehouse Manager	<p>Same responsibilities as the warehouse supervisor; And verifies and clears differences from the WM inventory count; Creates and changes bins. <b>NOTE:</b> The warehouse manager role should include the inventory manager role to perform the inventory transactions in conjunction with warehouse transactions.</p> <p>Also incorporates: MM-03 Inventory Manager FI-01 Financial Inquiry Only LO-01 Logistics Inquiry Only</p>

### **Inquiry Only:**

FI-01 Financial Inquiry Only	Display and reporting on all Financial Modules. Generally, this role will be mapped to everyone that has another Financial role and to those who have responsibility for overseeing and monitoring financial activities. Also incorporates: LO-01 Logistics Inquiry Only
LO-01 Logistics Inquiry Only	Display of Inventory Management information, such as: List of Material Documents; List of Warehouse Stocks on hand; Display of Individual and Collective MRP List; Display of Reservations; Listing of stock in transit; Display of Planned Orders; Display of Purchase Orders; Display of inventory counts; Display of Material Forecast; Display role for auditing maintenance work processes, property control and fleet operations. Legislative auditors currently operate in this display only mode in Protégé for reporting and auditing of all State agencies movable property. Display of Warehouse information, such as: Transfer requirements; Inventory Count Documents; Bins; Storage Units.

### **E Procurement (SRM) Job Functions:**

SRM-03 Requisitioner	Responsible for requesting goods/services and professional contract services (engineering, legal, consulting, etc.). This person will be creating shopping carts. Also incorporates: FI-01 Financial Inquiry Only LO-01 Logistics Inquiry Only
SRM-01 Approver	Shopping cart approver (cost center, fiscal (required for LaGov services and professional contracts, optional for materials and operating services), signature authority (required for professional contracts), Agency approver (required when PO > \$5000 and not result of RFx (bid), contract, or catalog). Also incorporates: FI-01 Financial Inquiry Only LO-01 Logistics Inquiry Only
SRM-02 Buyer	Responsible for: Processing shopping cart requests for goods/services and professional contract services. Processing will include: Creating purchase orders from the shopping cart and creating RFx (bids/RFPs), Evaluating and awarding responses; Creating resulting purchase orders/contracts. Our design to meet the encumbrance requirement is that professional contracts (engineering, legal, consulting, etc.) are purchase orders. This excludes “retainer contracts.” Buyer can create POs, RFxs, and contracts without a shopping cart request. Also incorporates: FI-01 Financial Inquiry Only LO-01 Logistics Inquiry Only
SRM-04 Buyer - Advanced	Allows for registration on behalf of the vendor in SUS via single sign-on eProcurement tab. Also incorporates: FI-01 Financial Inquiry Only LO-01 Logistics Inquiry Only
SRM-06 Buyer - Basic	Responsible for creating POs that will in most cases reference a statewide and/or agency contract. Also responsible for creating Shopping Cart requests for items not on a statewide and/or agency contract. The Buyer Basic role is not responsible for creating RFx, PO from RFx Response, Contract, and other advanced level procurement functions. Also incorporates: FI-01 Financial Inquiry Only

LO-01 Logistics Inquiry Only

SRM-05 SRM Display Only

Display and reporting on all SRM Modules. Everyone who has this role have the responsibility for overseeing and monitoring SRM activities.

Also incorporates:

FI-01 Financial Inquiry Only

LO-01 Logistics Inquiry Only

Urgent

This box should only be selected when a processing deadline would not otherwise be met.

The agency Security Administrator or Alternate must print the form and obtain the required signatures before submitting the form. The agency Security Administrator and Alternate are responsible for retaining a signed copy of each form submitted for audit purposes.